Germany Courier, Express, and Parcel (CEP) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2030)

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Abstracts

The Germany Courier, Express, and Parcel (CEP) Market size is estimated at 28.30 billion USD in 2024, and is expected to reach 34.95 billion USD by 2030, growing at a CAGR of 3.58% during the forecast period (2024-2030).

Significant growth is expected in CEP markets owing to increasing demand, residue impact of Russia Ukraine war, and consumer shift to online shopping

A total of 2,66,000 employees worked in CEP companies as of 2021. However, CEP companies in Germany hired about 20,000 additional workers during November-December 2022 to fulfill high demand during the Christmas season. Also, 10,000 vehicles were added to cater to increased delivery orders. Following a similar trend, it is estimated that the country would require an additional 50,000 workers by 2026 to cope with increasing growth and demand.

In Germany, the majority of parcels were domestic during 2019 and 2020. The courier, express, and parcel demand was largely driven by the consumers' online purchases of groceries and sanitary items during the pandemic. The number of parcels produced per household increased from 2019 to 2020. Amazon.de (net sales of USD 15.8 billion), otto.de (USD 5.3 billion), zalando.de (USD 2.2 billion), mediamarkt.de (USD 1.7 billion), and lidl.de (USD 1.2 billion) were the top 5 online retailers in Germany in 2020. These five online merchants collectively account for 47% of the German e-commerce market, which drove demand for domestic and international CEP deliveries in Germany.

The overall German parcel market is expected to grow at a CAGR of 3.77% from 2023-2029. This upward growth of value and volume trend is expected across domestic and international deliveries due to the demand shock witnessed from 2020 to 2022 due to the pandemic, the Ukraine-Russia War, and existing market trends and consumer shift toward e-commerce. The growth is influenced by partnerships in industry as well. For instance, in March 2023, DHL and Poste Italiane signed a strategic partnership in the Italian and international parcel markets. Under the partnership, Poste Italiane will deliver parcels from DHL eCommerce Solutions and DHL Parcel Germany shipped to Italy.

Germany Courier, Express, and Parcel (CEP) Market Trends

Germany leads European logistics and transportation with USD12.80 billion investment in highways in 2022

The German transportation industry is key to maintaining well-functioning services and moving goods within and outside the nation. The country has some of the highest-ranked infrastructural networks in the world, with its roads being some of the more heavily traveled thoroughfares in Europe. Transportation and storage recorded a high growth rate of 6.80% YoY in March 2022 and a low rate of -1.60% YoY in March 2021 due to the recovery from the pandemic and the resumption of trade with foreign countries.

The transportation and warehouse sector's significance extends to the facilitation of operations in various other industries. Germany asserts its dominance, surpassing even the second and third-largest logistics markets, namely France and the United Kingdom. Globally, Germany holds the esteemed rank of being the third-largest both in terms of imports and exports of goods. The German federal government articulated its plans to augment investments in transportation infrastructure, signaling a commitment to allocate additional funds in 2022. This commitment materialized through an allocation exceeding EUR 12 billion (USD 12.80 billion) for federal highways and approximately EUR 1.7 billion (USD 1.81 billion) for waterways in the same year.

The German government intends to invest more in rail than roads to promote environmental protection, sustainability, and effective transportation. In 2022, Deutsche Bahn, the federal government, and the local and regional governments invested roughly EUR 13.6 billion (USD 14.51 billion) in rail infrastructure. Lower Saxony, Hamburg, Bremen, Mecklenburg-Western Pomerania, and Schleswig-Holstein, together with DB, invested in modernizing their rail networks by 2030.

Fuel prices in Germany have been rising rapidly owing to high annual inflation rate

In January 2022, Germany's daily average diesel price was USD 1.66 per liter, almost 37 cents (USD 0.37) more than the average monthly diesel price in January 2021. The price of E10 premium petrol also followed a similar trend. In January 2022, it cost USD 1.84 a liter, 32 cents (USD 0.32) cheaper compared to January 2021. The price hike for diesel and E10 fuels can be attributed to rising oil prices. Crude oil price indicators WTI and Brent Crude hit seven-year high in 2022.

Transport prices on Europe's roads reached an all-time high in Q4 2021, the sixth consecutive quarter recording an increase in freight rates. On the carrier side, the biggest drivers behind this development were rising fuel costs, up by 25% YoY in Germany. However, petrol and diesel fuel were more expensive in Germany than in the rest of the European Union. As the discount on fuel expired, motor fuel prices in Germany increased, with filling stations charging more for petrol and diesel fuel than those in all the EU countries bordering Germany.

German consumers faced the fastest price rise, and the high annual inflation rate was primarily driven by extreme price increases for energy and groceries since the Russia-Ukraine War. Germany is among the world's biggest natural gas importers. Around 95% of its gas consumption is met by imports. In 2022, 55% of gas imports came from Russia, 30% from Norway, and 13% from the Netherlands. The prices of heating oil (up 87%) and natural gas (up 64.8%) increased the most, while electricity prices rose by 20.1%. Petroleum and diesel prices at the pump increased by 26.8% for drivers.

Germany Courier, Express, and Parcel (CEP) Industry Overview

The Germany Courier, Express, and Parcel (CEP) Market is moderately consolidated, with the top five companies occupying 63.66%. The major players in this market are DHL Group, FedEx, International Distributions Services (including GLS), La Poste Group and United Parcel Service of America, Inc. (UPS) (sorted alphabetically).

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